

THE DUTCH MARKET

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CONTINUED GROWTH

over 30 million admissions: for the first time in 33 years



KEY FIGURES 2011

Admissions: 30.434.937 (+ 8 %)

Box Office: € 239.928.440 (+ 9 %)

Average price ticket 2011: € 7,88 (+ 1,3 %)

Inhabitants: 16,7 million

Cinema: 239

Screen: 789

Seats: 130.641



MARKET SHARES CINEMA EXHIBITORS 2011

	boxoffice (x 1.000 €)	%	admissions (x 1.000)	%	cinema	screen
Concerns						
Pathé Bioscopen	105.820	44,1%	13.228	43,4%	21	159
JT Bioscopen & Luxor Theaters	24.347	10,1%	2.816	9,3%	19	85
Wolff Bioscopen	14.309	6,0%	1.828	6,0%	10	50
Utopia Bioscopen	10.251	4,3%	1.285	4,2%	6	39
Total concerns	154.727	64,5%	19.157	62,9%	56	333
Other						
Independents (commercial)	72.182	30,0%	9.315	30,6%	82	295
Arthouses **	13.128	5,5%	1.986	6,5%	101	161
Total other	85.310	35,5%	11.301	37,1%	183	456
Grand Total	240.037	100,0%	30.458	100,0%	239	789

MARKET SHARES DUTCH FILM 2011

(based on admissions)

-- Market shares Dutch Film 2011: 21,88 %

-- Number of Dutch titles released in 2011: 48

Source: NVF



2011, a good year for Dutch movies

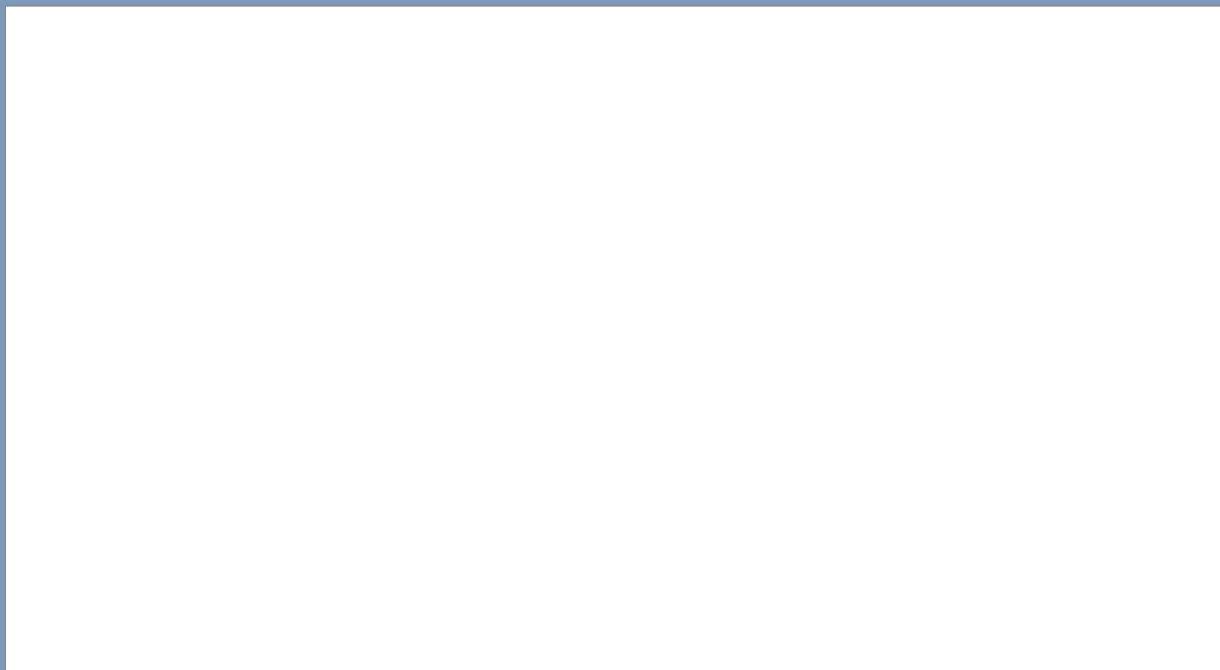
Market share in ten years from 10,5% in 2002 to 22,34 % in 2011

Gooische Vrouwen, number one movie in 2011, got 1,9 million admissions - highest admissions rate since the 1986 *Flodder*

18 Dutch titles with over 100.000 admissions in 2011, 13 in 2010

MORE ADMISSIONS

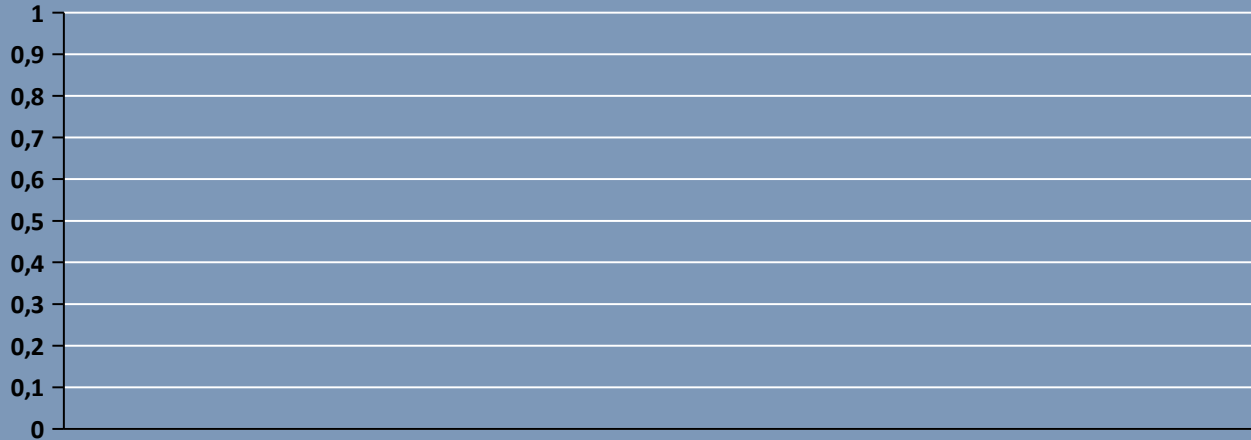
more than half of all Dutch citizens (16+) visited a cinema or arthouse in 2011



Source: CentERdata & Stichting Filmonderzoek

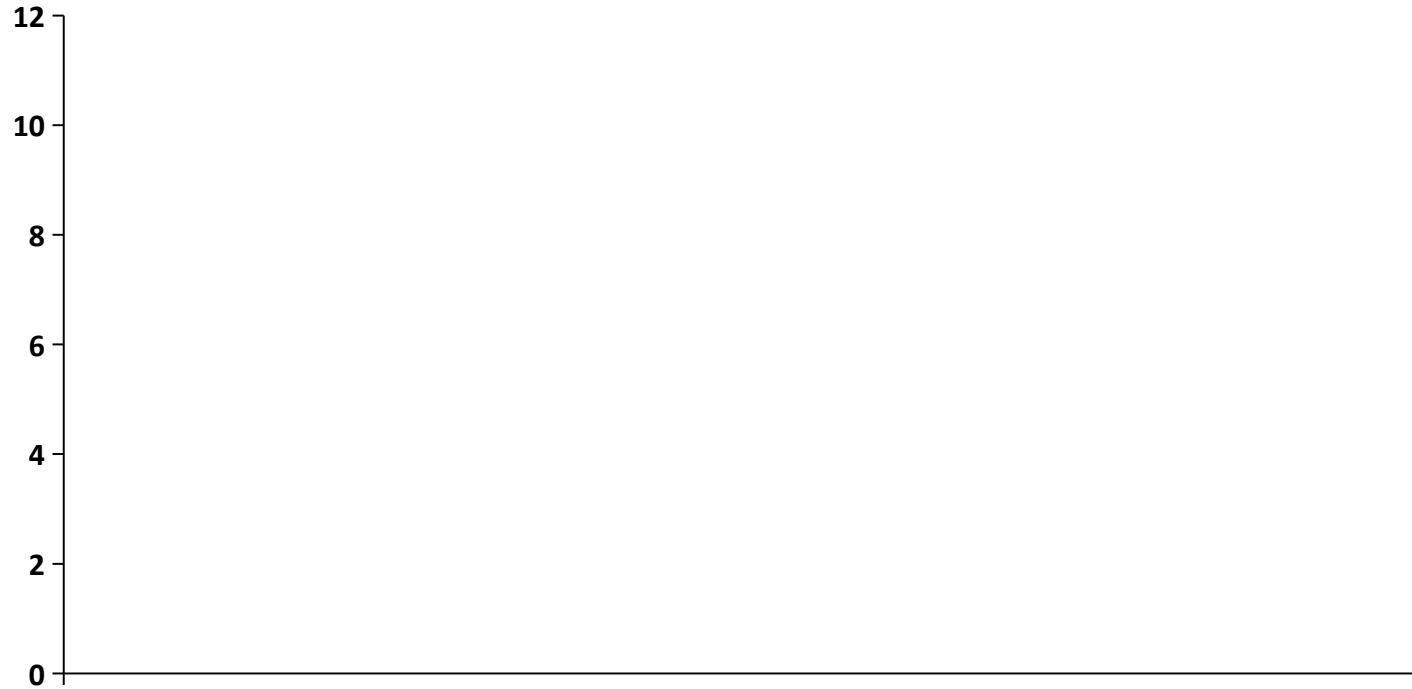
MORE RETURN VISITS

almost half (46%) of the visitors frequently (>3) visited a cinema or arthouse in 2011



Source: CentERdata & Stichting Filmonderzoek

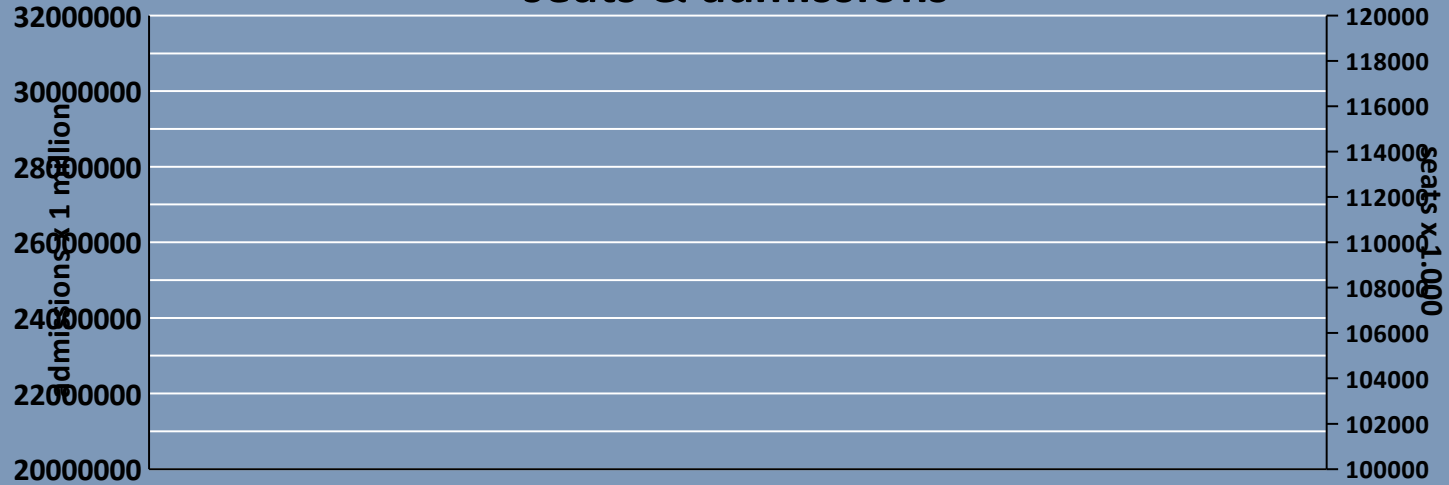
SCOPE BY AGE CATEGORY



Source: CentERdata & Stichting Filmonderzoek

OFFER CREATES DEMAND

seats & admissions



-- Admissions

-- Seats

EXAMPLE: GROWTH BY CITY

		screens	seats	growth	admissions	growth
Tilburg	2007	10	1.887		343.000	
Tilburg	2011	23	4.344	230%	1.085.000	316%
Roermond	2007	3	644		33.000	
Roermond	2011	10	2.356	366%	199.000	603%
Almelo	2007	1	166		3.000	
Almelo	2011	5	654	394%	134.000	4467%

ANNUAL FREQUENCY PER CAPITA* IN EUROPE

France	3,3
United Kingdom	2,8
Norway	2,4
Denmark	2,3
Austria	2,1
Spain	2,1
Belgium	1,9
<i>* annual frequency per capita = admissions / inhabitants</i>	
The Netherlands	1,8
Germany	1,4

ALL IS WELL, HOWEVER...

... gloomy economic outlook

... culture cuts will lead to less Dutch titles produced in the coming years

... downloading without proper regulation threatens innovation within the industry